Altigen
AI CUSTOMER ENGAGEMENT

CoreEngage Agent Training

A step-by-step guide to handling calls in Microsoft Teams

Altigen Technologies | 2026

Training Agenda

01

Getting Started

Sign in to Teams and add the CoreEngage app.

02

Agent Console

Navigate the console, set your status, and join queues.

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Call Handling

Answer calls, manage active calls, and complete wrap-up.

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Transfers & Calling

Transfer calls, make outbound calls, and review history.

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Agent Assist

Use caller context, recording controls, and AI summaries.

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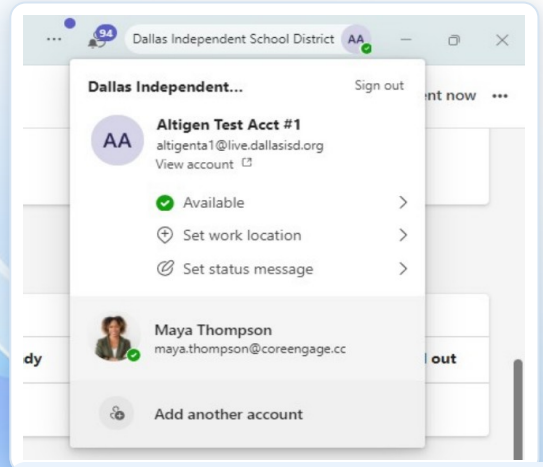
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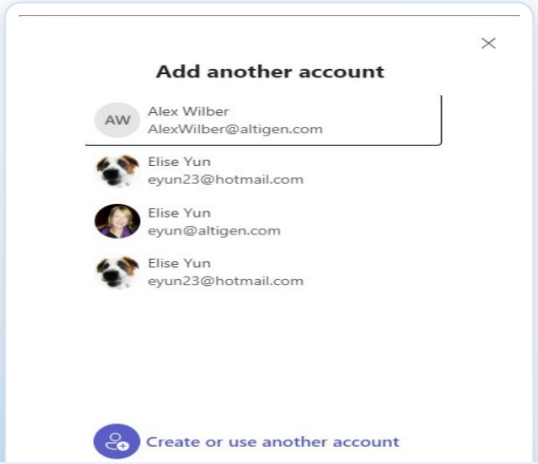
Getting Started

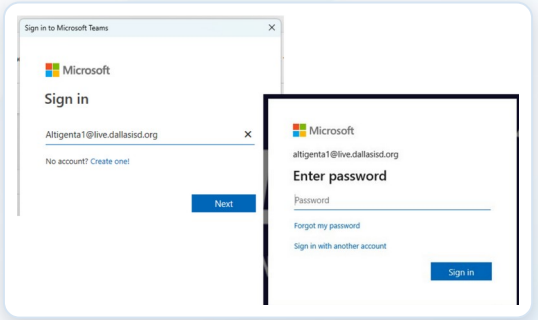
Sign in and add CoreEngage to Microsoft Teams

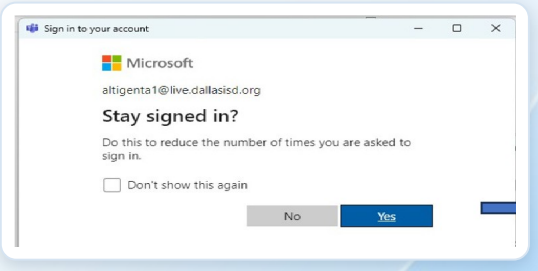
Sign In to Teams with Your Test Account

1. Select your profile (upper right), then Add another account.
2. Select Create or use another account.
3. Enter your test user name and password.
4. If asked to stay signed in, select Yes.





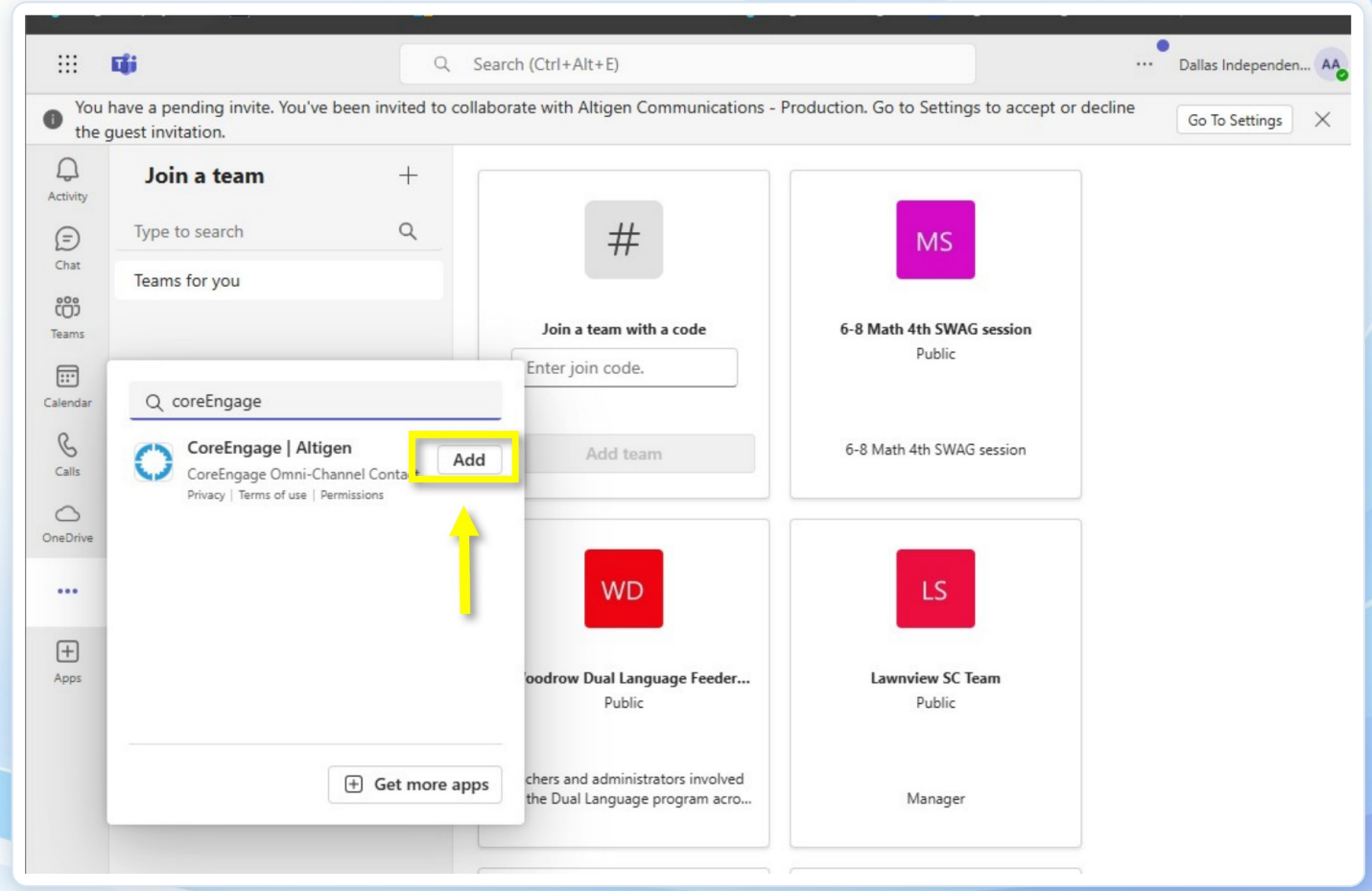




Note: This test-account sign-in is for training only. You won't need it after go-live, and multi-factor authentication isn't required.

Add CoreEngage to Teams

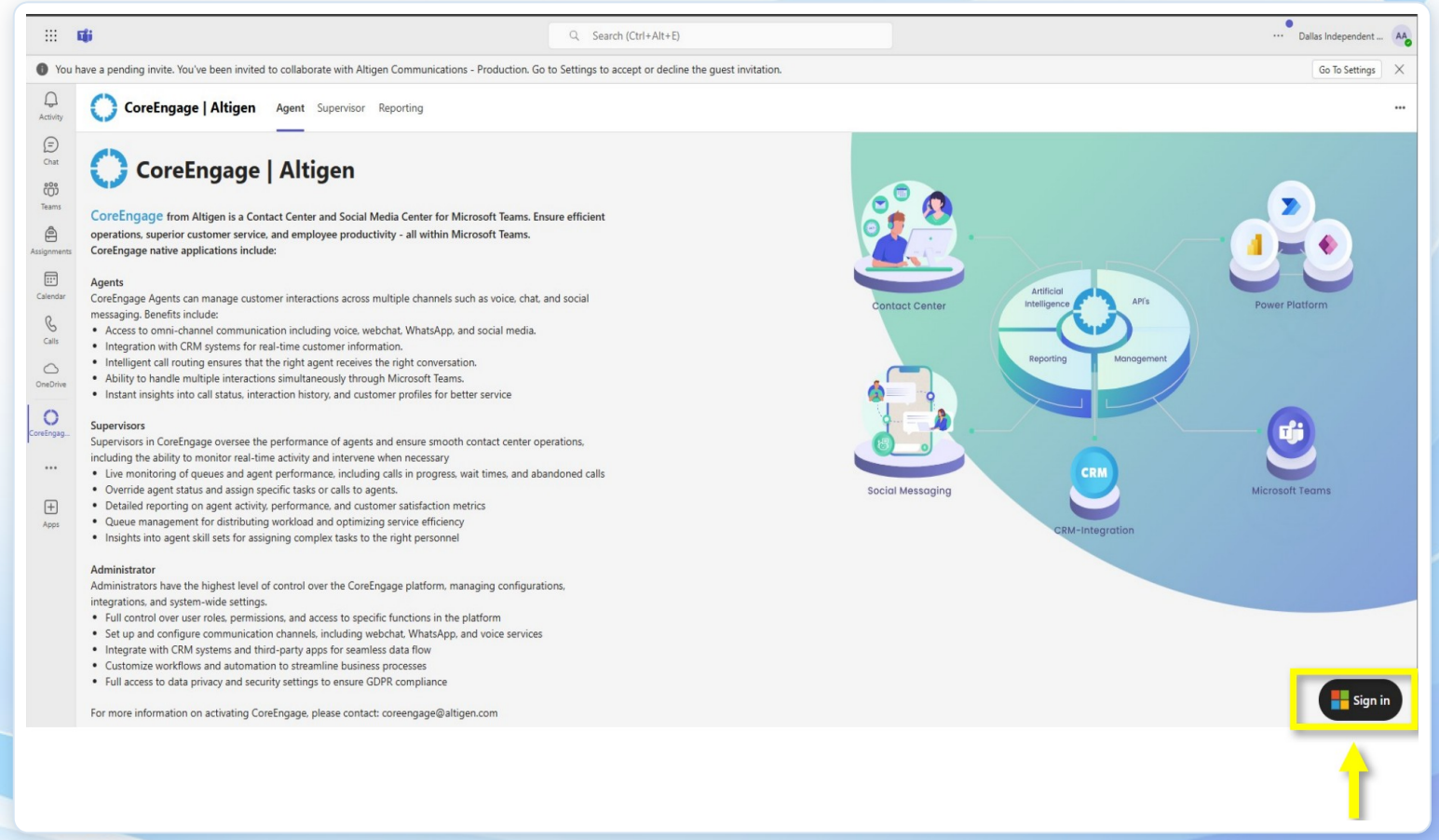
1. In Teams, select … (More apps) on the left navigation bar.
2. Type CoreEngage in the search field.
3. When the app appears, select Add.
4. The app installs and appears on your Teams navigation bar.



Sign In to CoreEngage

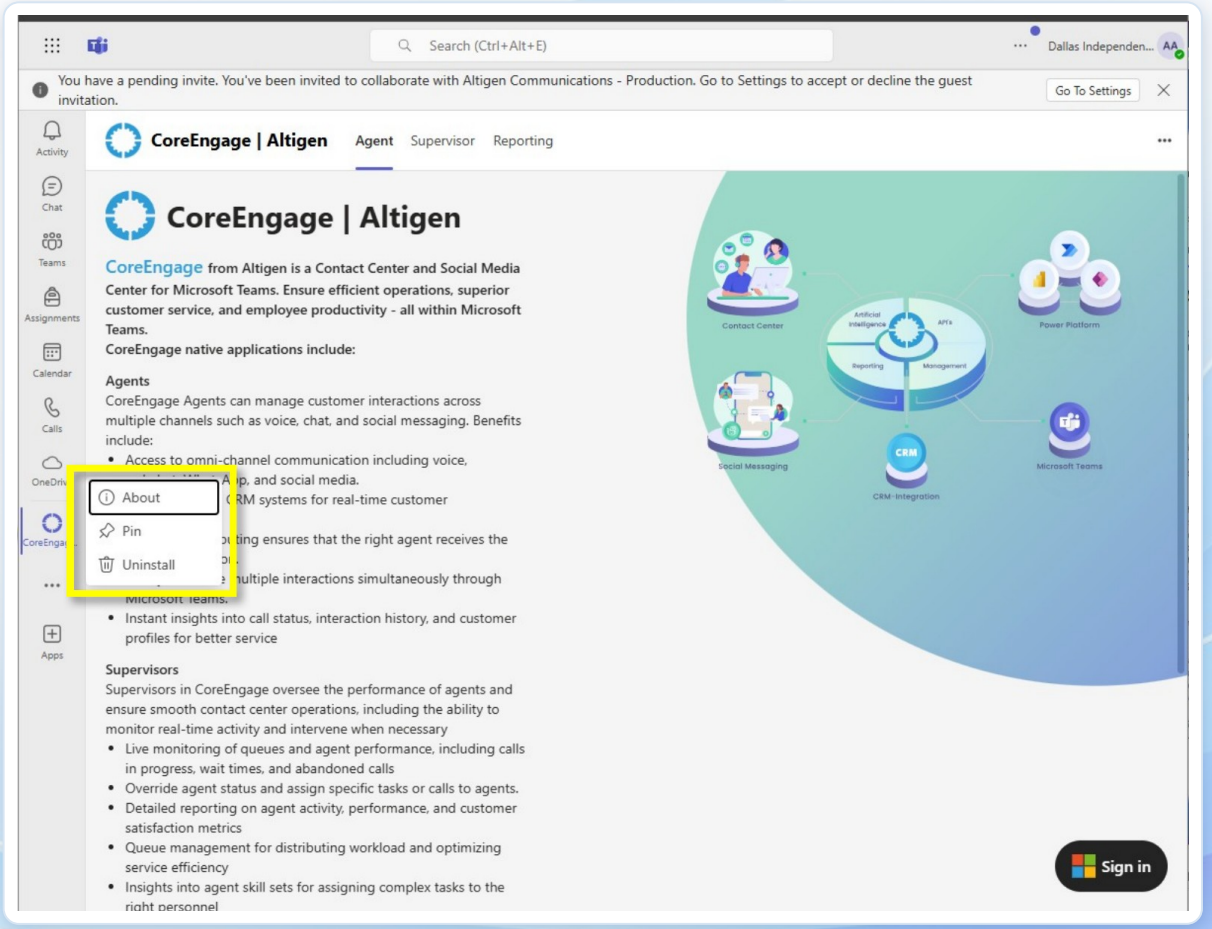
1. When installation finishes, the CoreEngage welcome screen opens.
2. Select Sign in in the lower-right corner.

Tip: Once signed in, you're ready to pin the app and start testing.



Pin CoreEngage for Quick Access

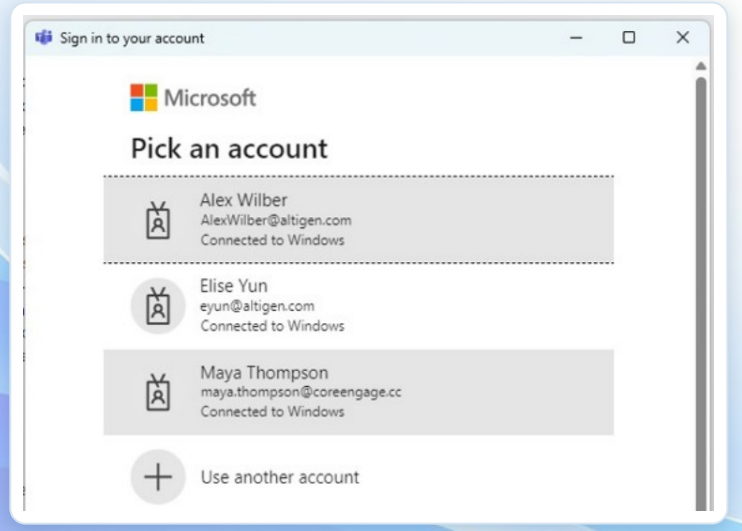
1. Right-click the CoreEngage icon on the Teams navigation bar.
2. Select Pin.
3. CoreEngage now stays on your navigation bar for easy access.



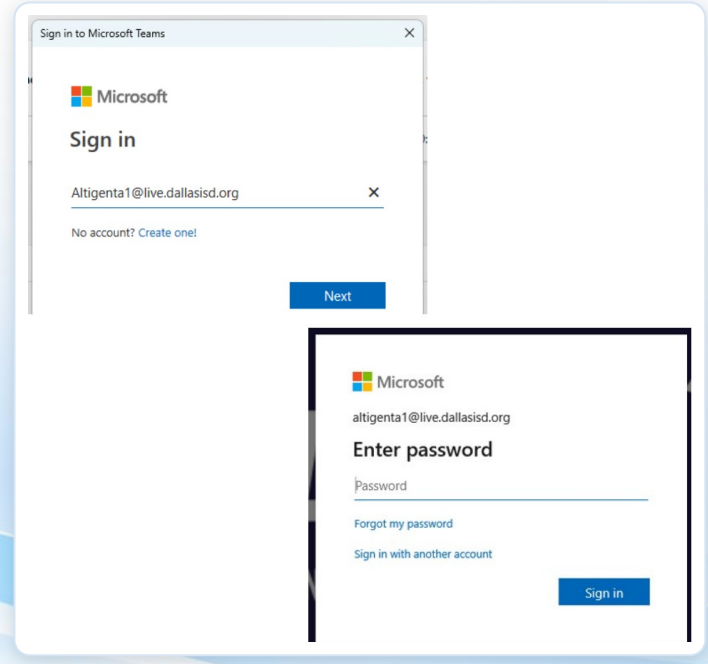
Confirm Your Microsoft Credentials

Microsoft may ask you to sign in again after you open CoreEngage.

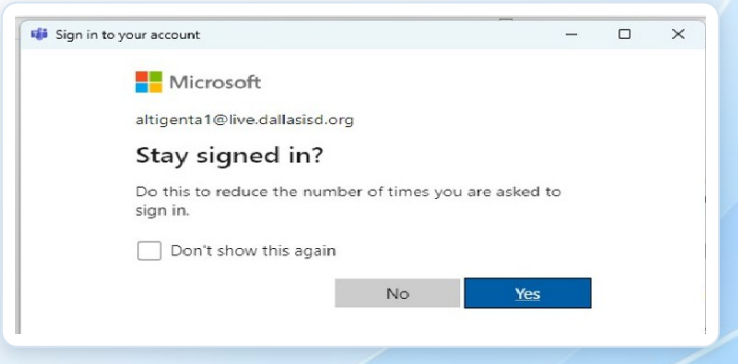
1. If your test account isn't listed, select Use another account.



2. Enter your test user name and password.



3. If asked to stay signed in, select Yes.



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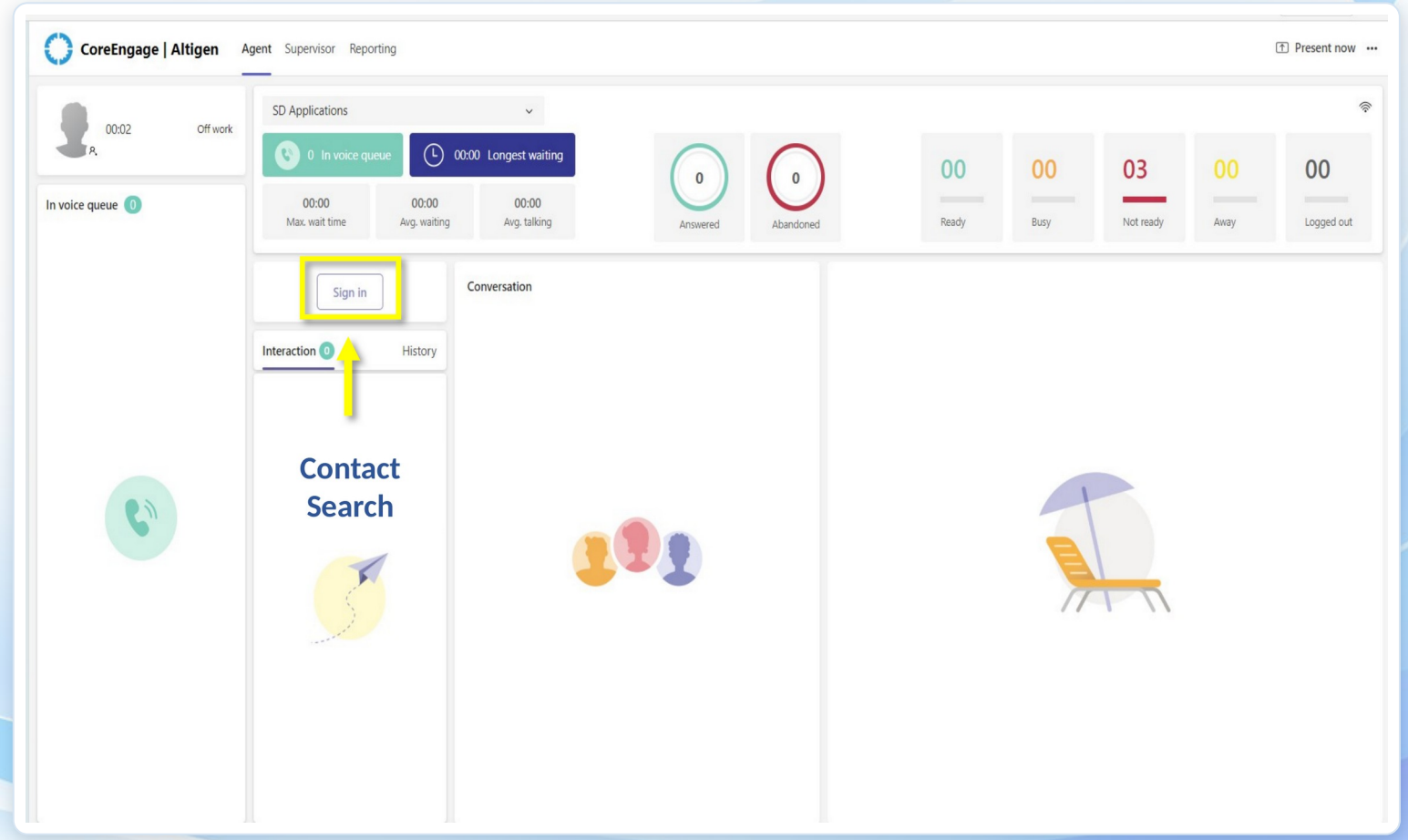
Agent Console

Navigate the console, set your status, and manage queues

Access Your Contacts

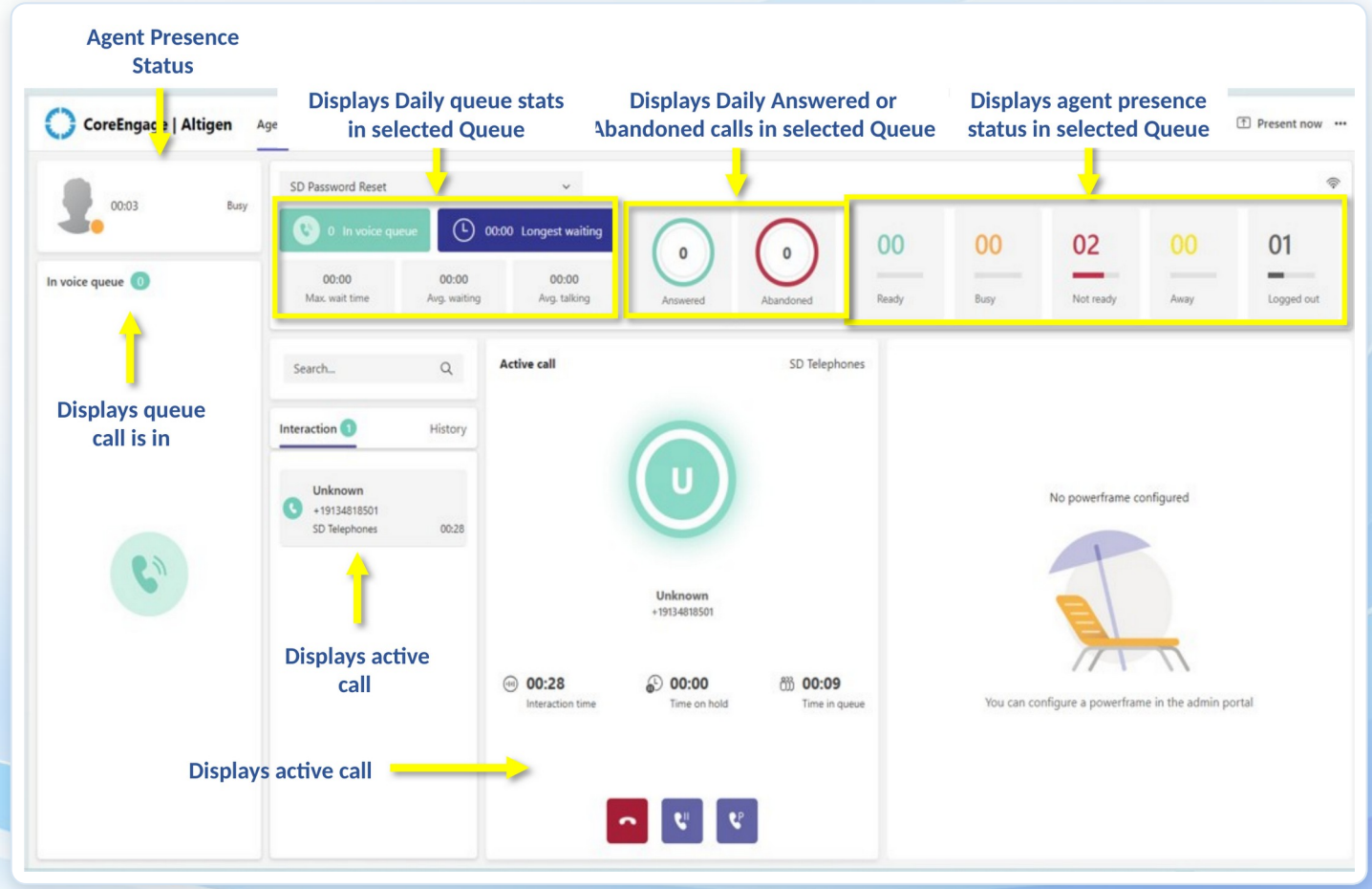
1. After you sign in, the agent console opens.

2. To see your contacts, other agents, and favorites, select Sign in under Contact Search.

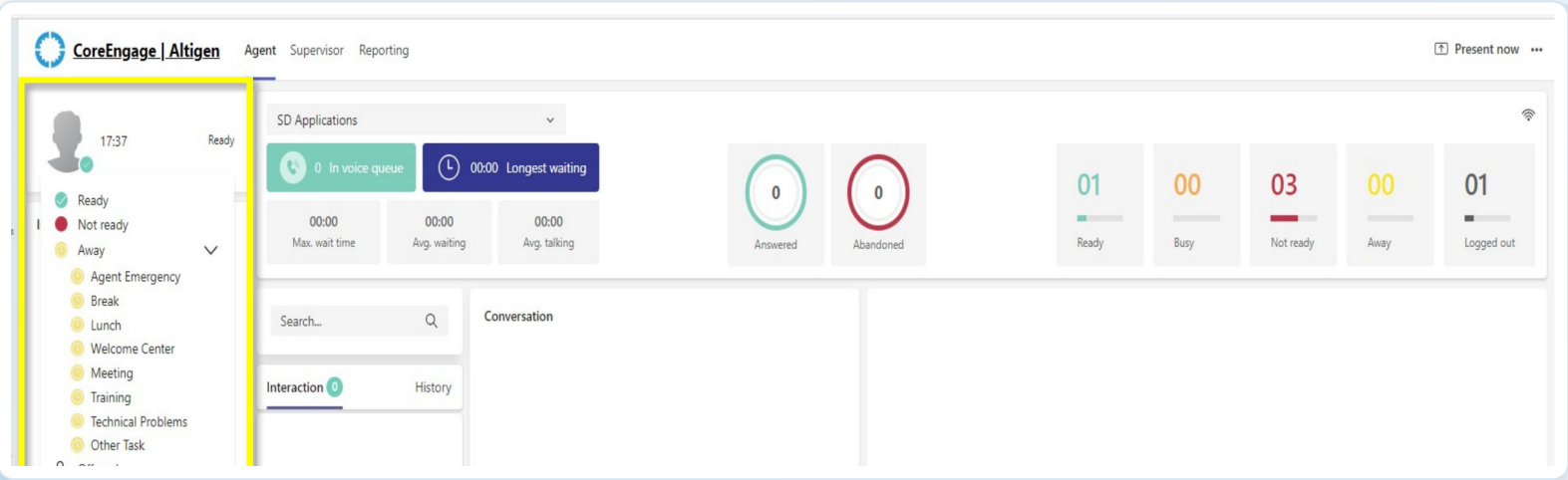


Agent Console Overview

- **Agent profile**
  Change your presence status.
- **Status bar**
  Queue, call, and presence stats.
- **In voice queue**
  Calls waiting in your queue.
- **Interaction**
  Your active calls.
- **Search**
  Find contacts or dial a number.
- **Active call**
  Live call details and controls.
- **Power frame**
  Can show ServiceNow, disposition codes, or a CRM.



Set Your Status to Ready



To receive calls, change your status to **Ready**.

Supervisors (and other agents, if configured) can see your status. Time in each status appears in reporting.

Ready

Available. Calls are delivered to you.

Not Ready

Not available to take calls.

Away

Not available. Reason codes can track why.

Off Work

Not available to receive calls.

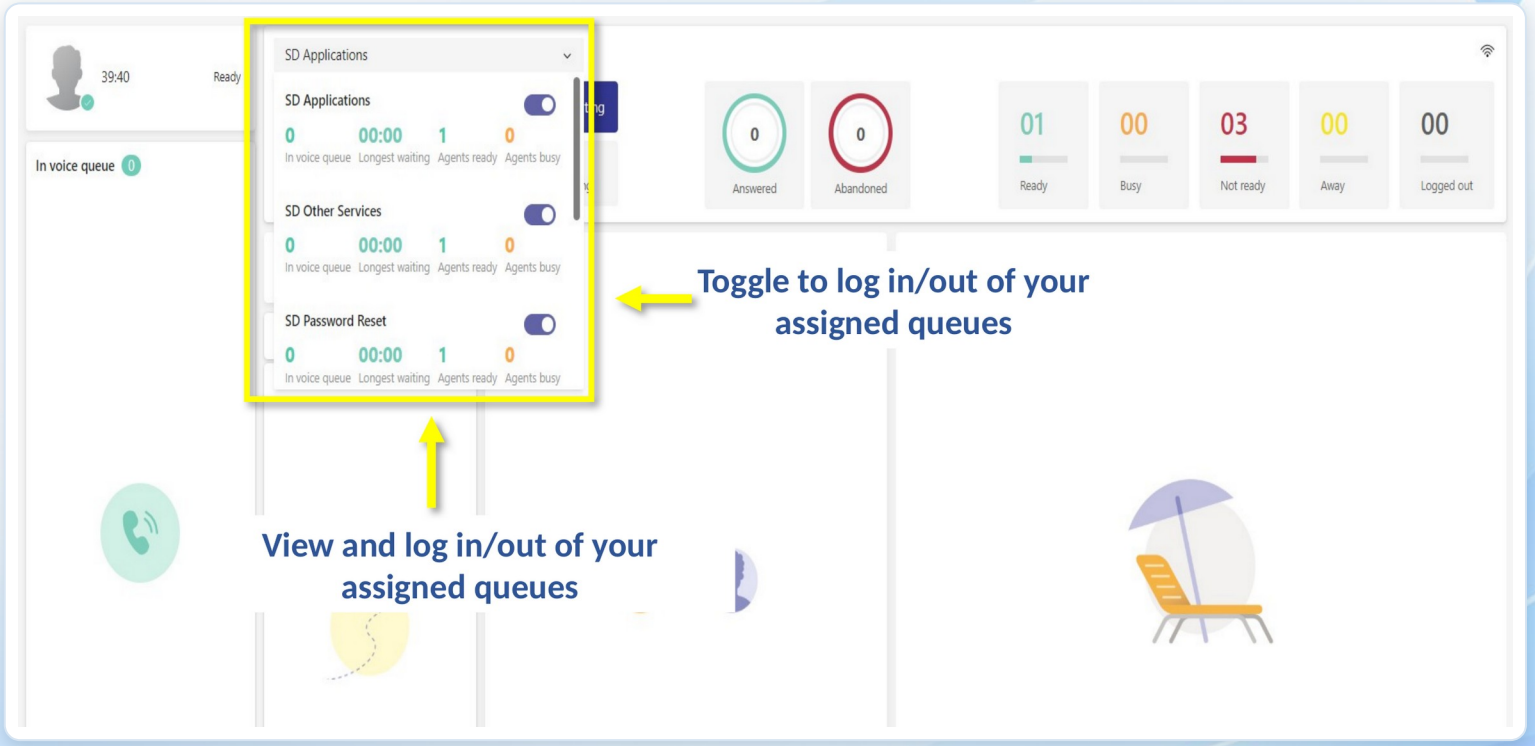
Sign Out

Signed out of CoreEngage.

Log In and Out of Queues

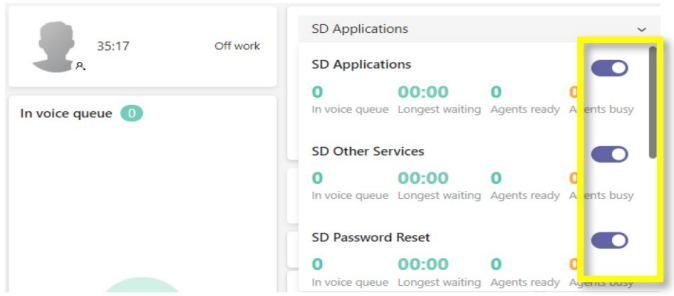
1. Select the queue drop-down next to your agent profile to see your queues.
2. Use each toggle to log in to or out of that queue.

Note: Your system administrator sets which queues appear in your list.

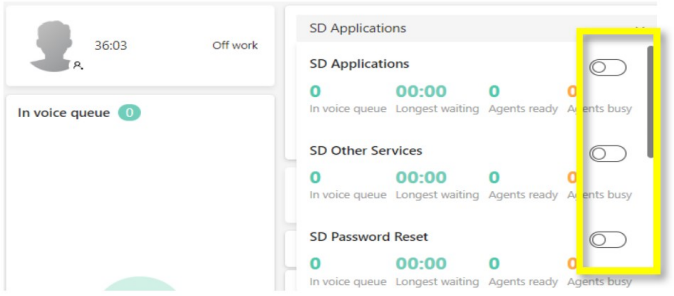


Example: Working in Multiple Queues

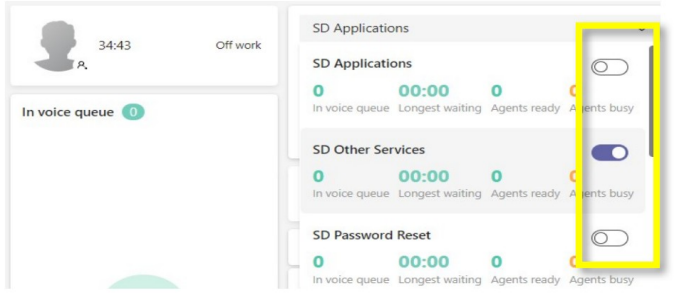
Agent is available to take calls in all queue's



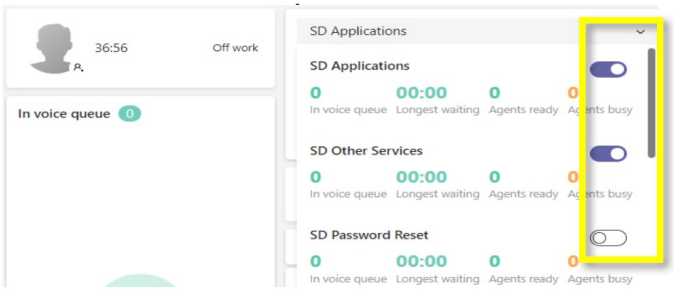
Agent is NOT available to take calls in all queue's



Agent is available to take calls in the SD Other Services Queue



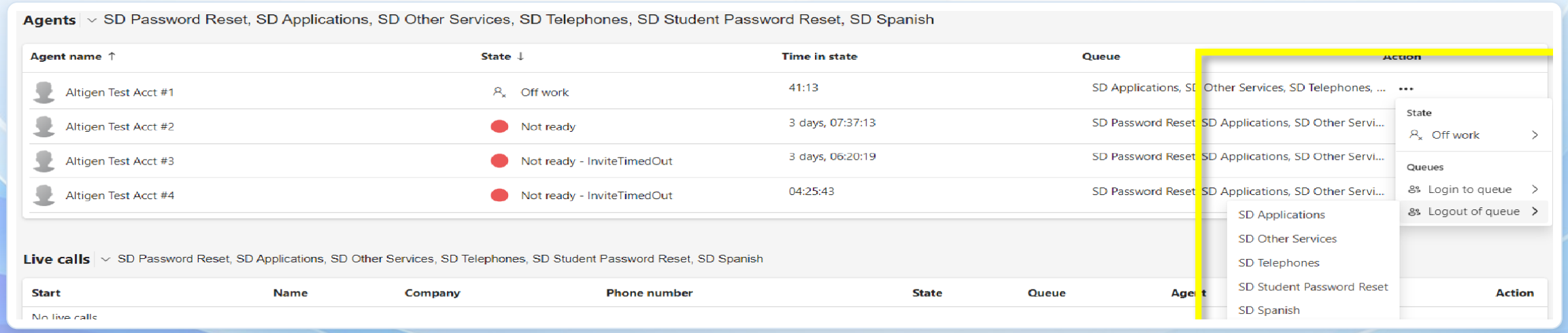
Agent is available to take calls in the AD Applications & SD Other



Tip: When you belong to several queues, you or your supervisor can log you in or out of each one individually.

Supervisors Can Manage Queue Log-In

1. Open the Supervisor module.
2. Select the agent, then select … (more options).
3. Choose Log in or Log out of the queue.



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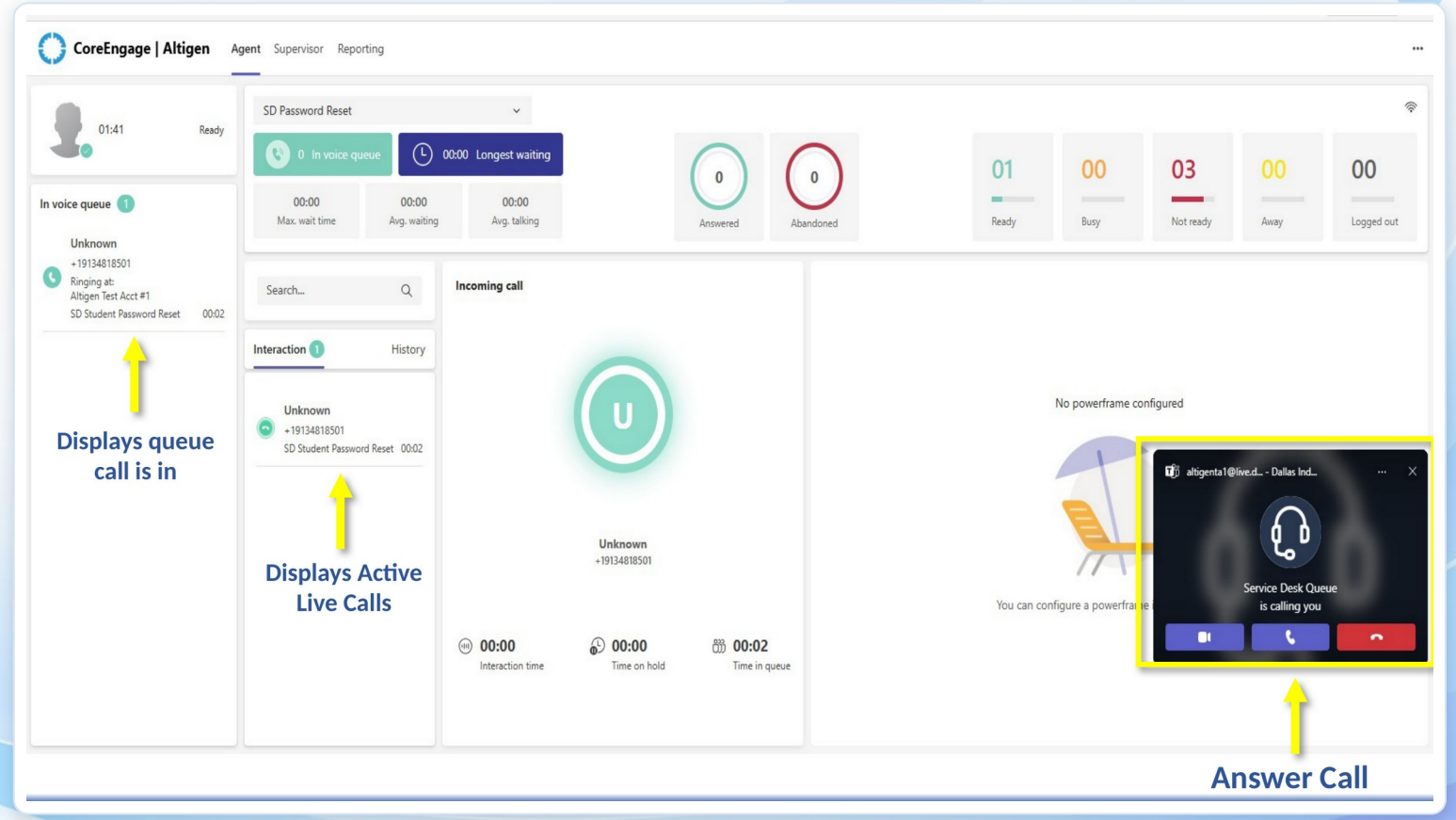
Call Handling

Answer calls, manage live calls, and wrap up

Answer a Call

1. When a call arrives, select the phone icon on the Teams notification.
2. After you answer, handle everything else in CoreEngage.

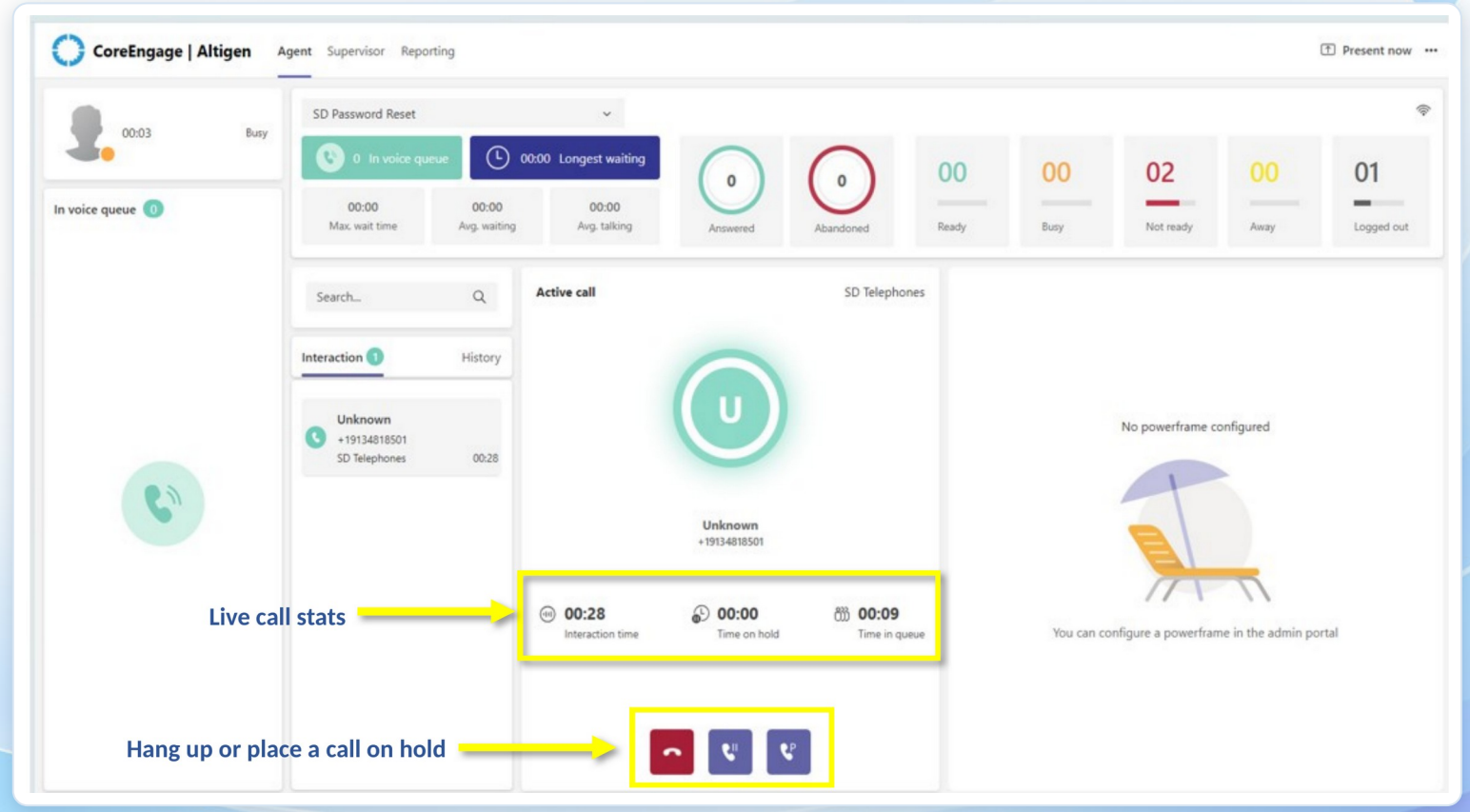
Tip: The console shows which queue the call came from and your live calls.



Manage an Active Call

1. Use the call controls to hang up or place the caller on hold.

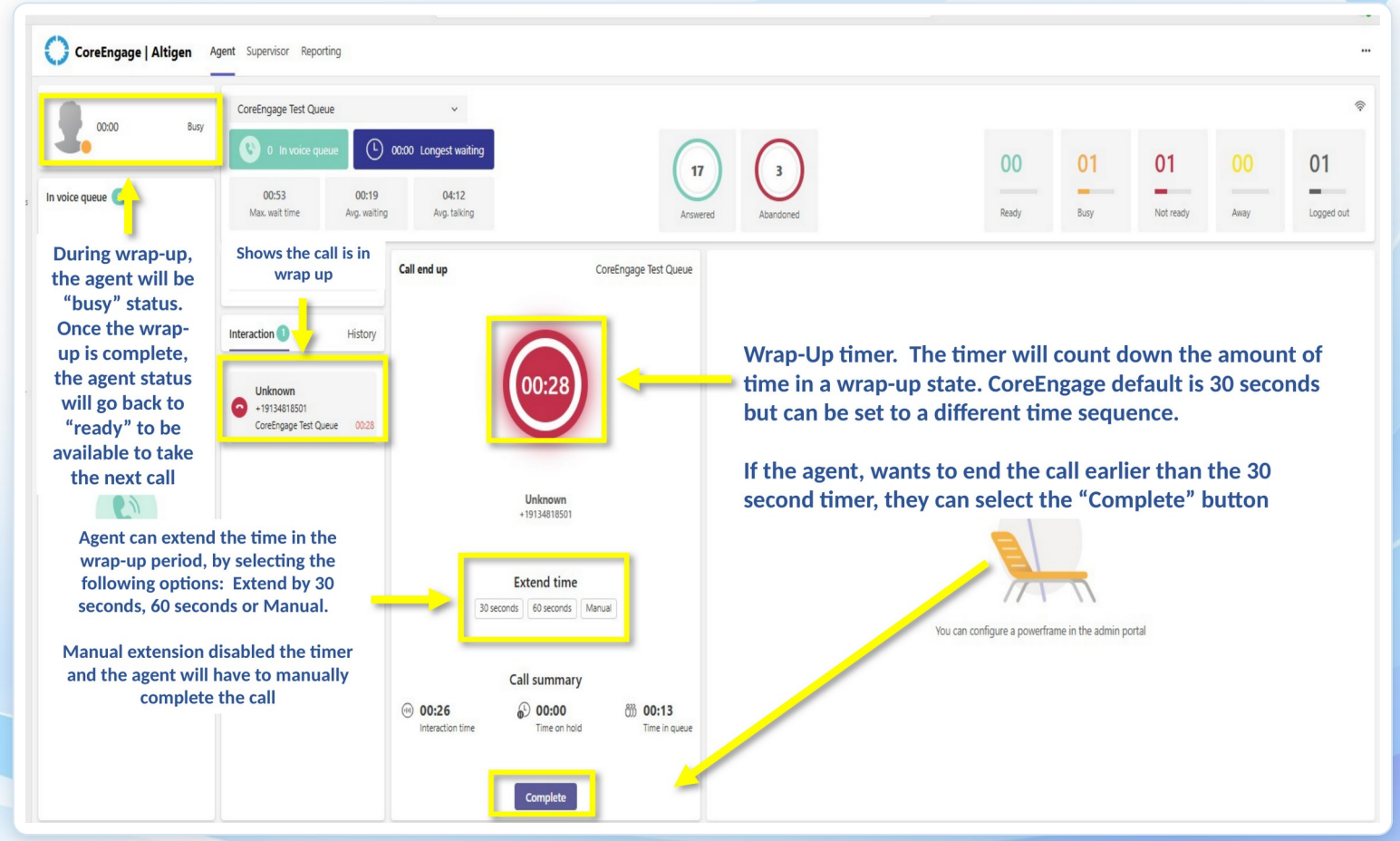
2. Live stats track interaction time, hold time, and time in queue.



Complete Wrap-Up After a Call

Wrap-up is time after a call to finish notes and follow-up before your next call.

1. **Status:** You show as Busy during wrap-up, then return to Ready.
2. **Timer:** Counts down from 30 seconds by default (configurable).
3. **Finish early:** Select Complete.
4. **Need more time:** Extend by 30 sec, 60 sec, or Manual. Manual stops the timer, so select Complete when done.



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04

Transfers & Calling

Transfer calls, place outbound calls, and review history

Two Ways to Transfer a Call

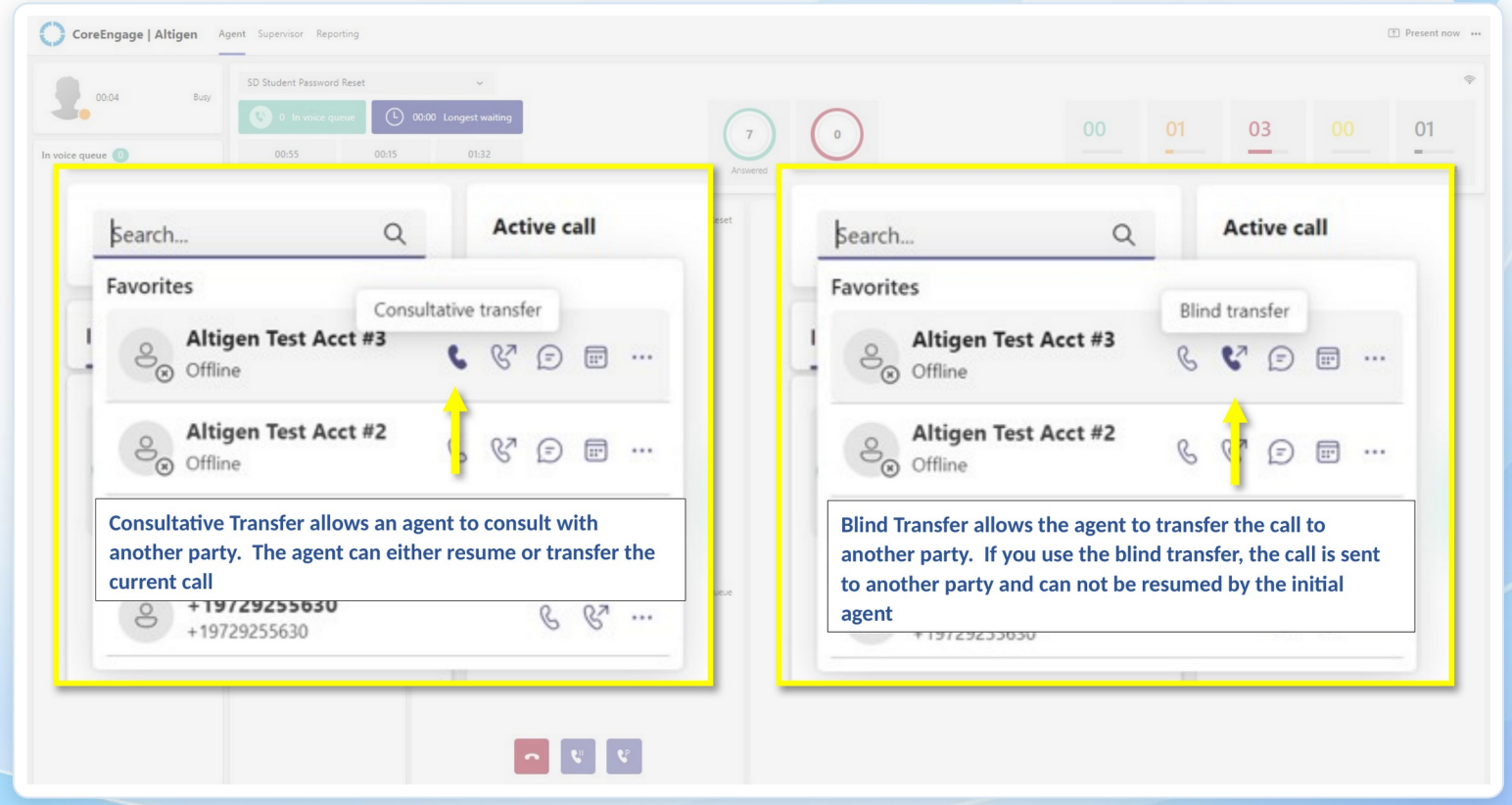
In Search, type an agent's name or number, or an external number. Then choose a transfer type.

Consultative transfer

Talk to the other party first, then resume the caller or complete the transfer.

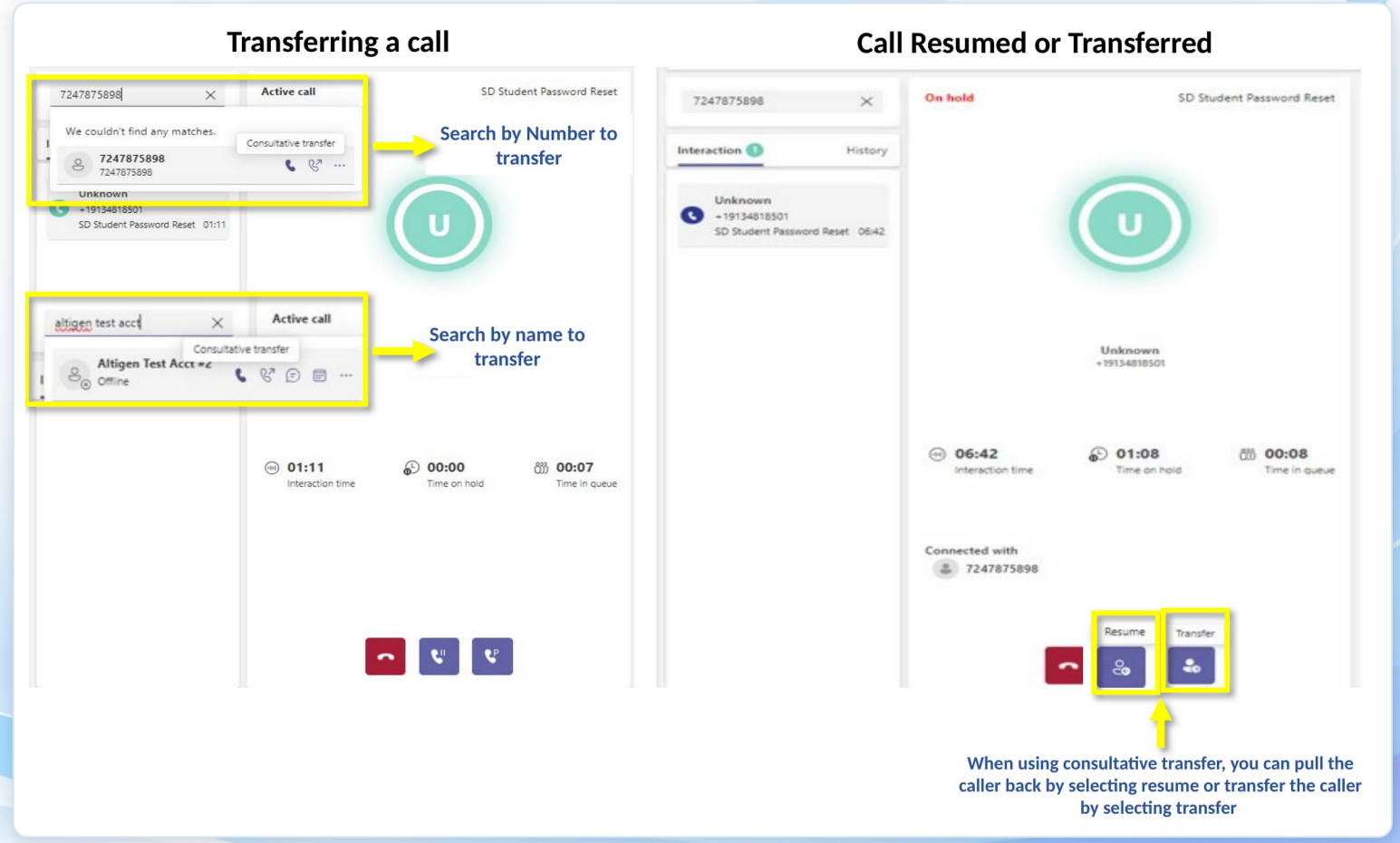
Blind transfer

Send the call straight through. Once it's answered, you can't take it back.



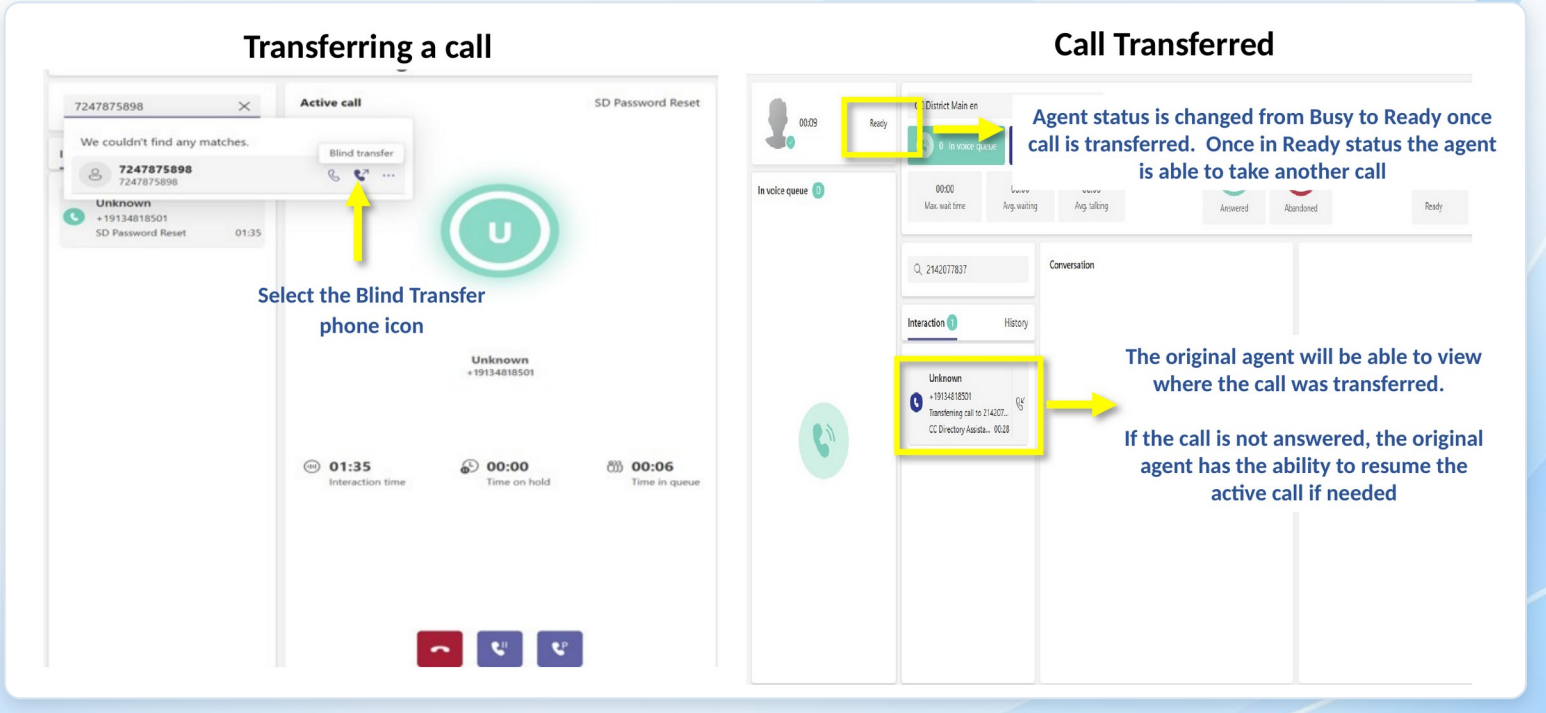
Consultative Transfer Example

1. In Search, type a name or number.
2. Select the Consultative Transfer icon.
3. After speaking with the other party, select Resume to return to the caller or Transfer to complete the handoff.



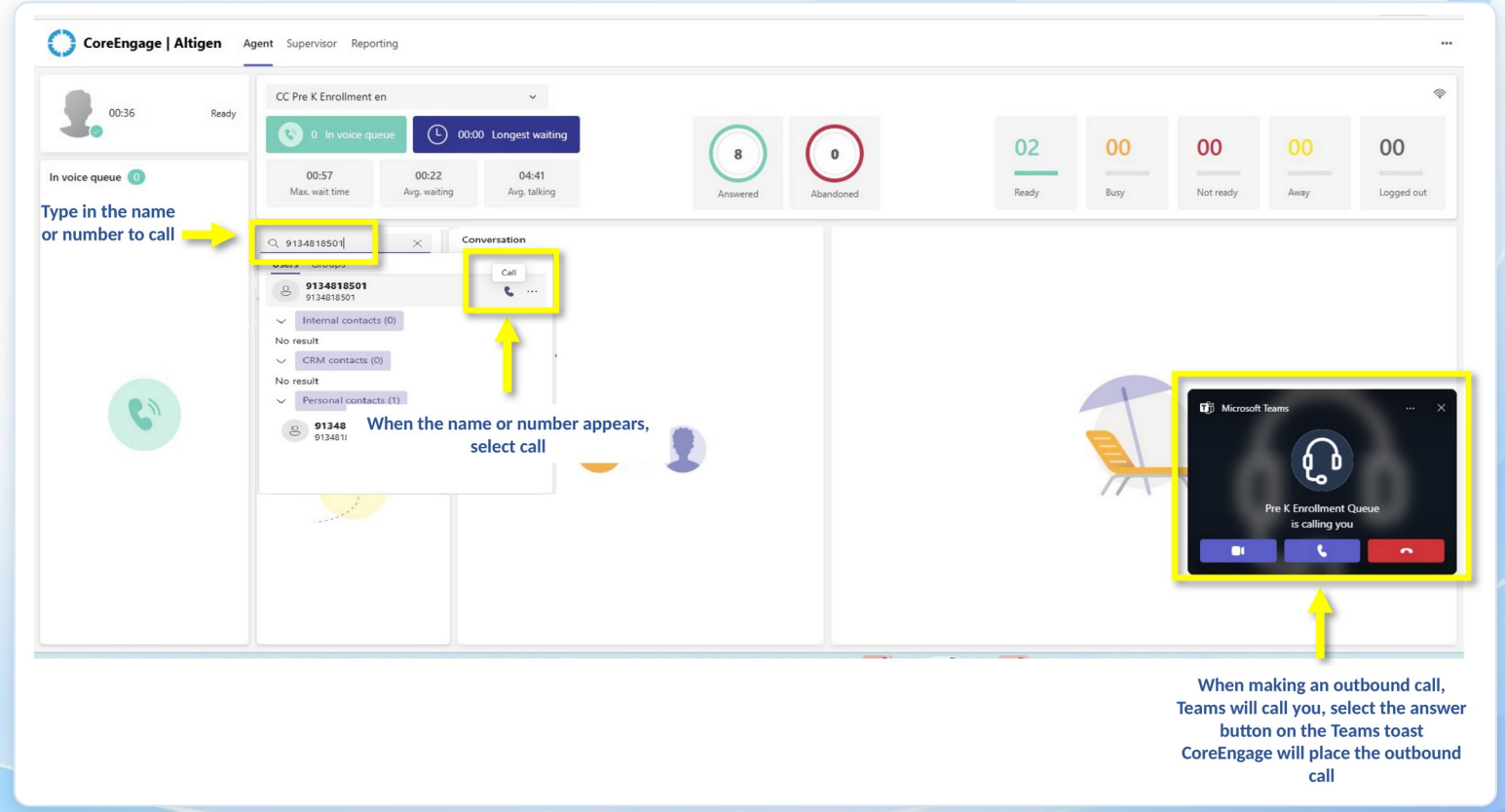
Blind Transfer Example

1. In Search, type a name or number.
2. Select the Blind Transfer icon.
3. Your status changes from Busy to Ready, so you can take the next call.
4. You can see where the call went. If it isn't answered, you can resume it.



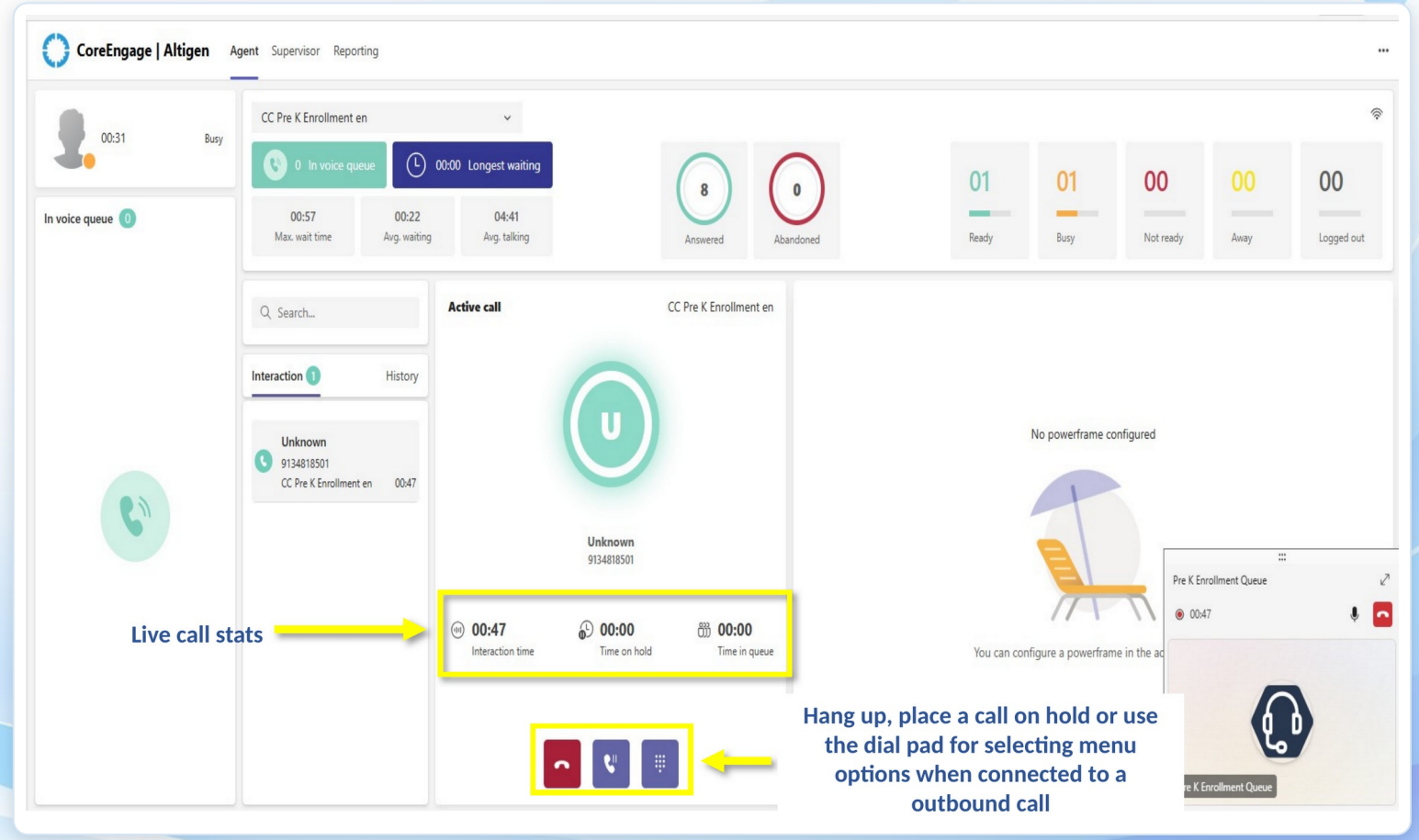
Place an Outbound Call

1. Type a name or number in Search.
2. When it appears, select Call.
3. Teams calls you first. Answer on the Teams notification.
4. CoreEngage places the call. Handle the rest in CoreEngage.



During an Outbound Call

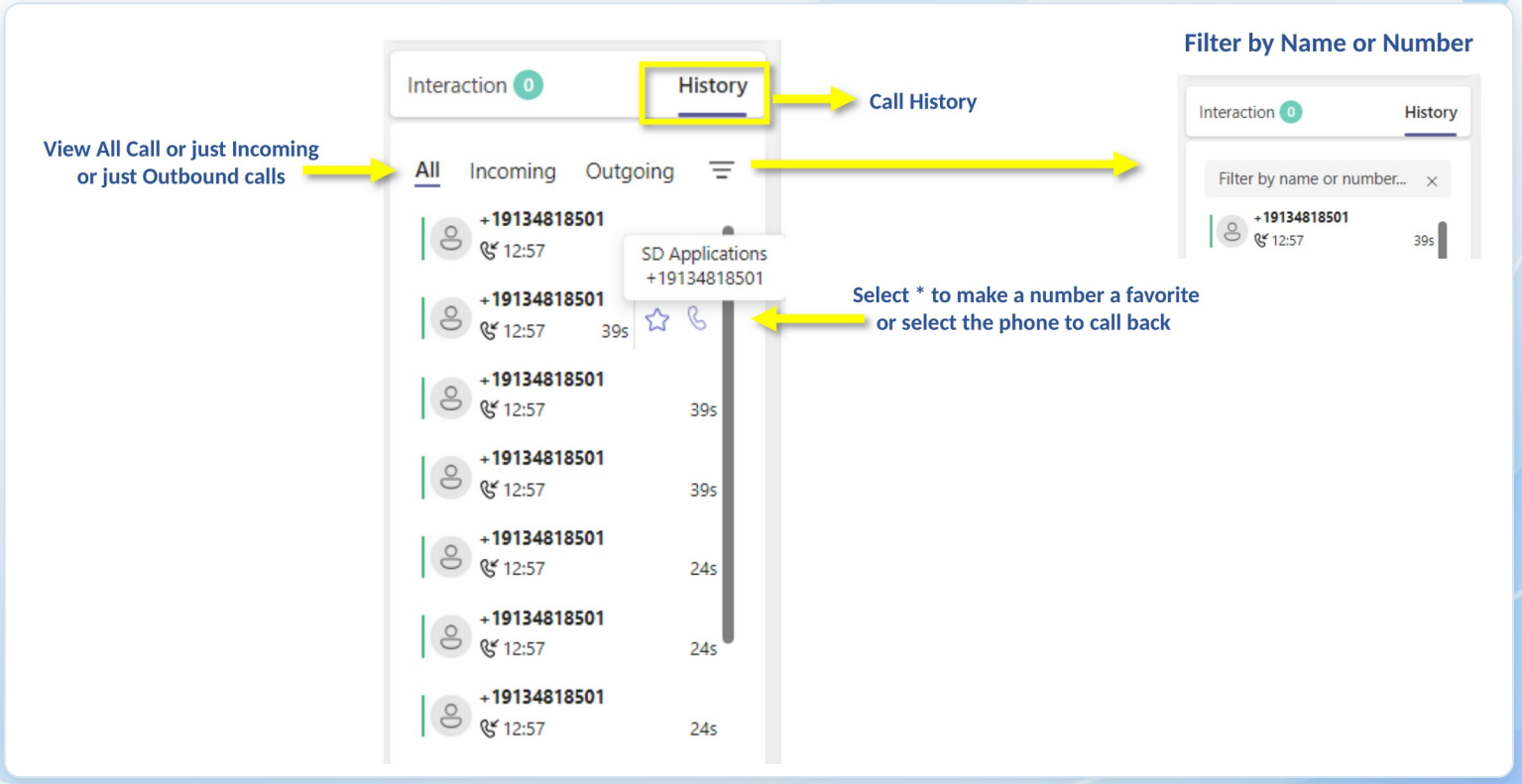
1. Use the call controls to hang up or place the call on hold.
2. Use the dial pad to choose menu options, such as pressing 1 for English.
3. Live stats track interaction time, hold time, and time in queue.



Review Call History

1. In the Interaction panel, select History.
2. Search for a number or scroll all calls. Filter by All, Incoming, or Outgoing.
3. Hover over a call to favorite it, call back, or see its queue.

Tip: History shows each connected call, the time it came in, and its length.



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05

Agent Assist

Caller context and AI insights in your workspace

What Is Agent Assist?

A panel in the CoreEngage workspace that shows caller data, history, and AI insights the moment a call connects, with no extra lookup.

CRM Recognition

Caller details and account context are matched and shown automatically.

Interaction History

A full log of past calls, dates, endpoints, and which agent handled each.

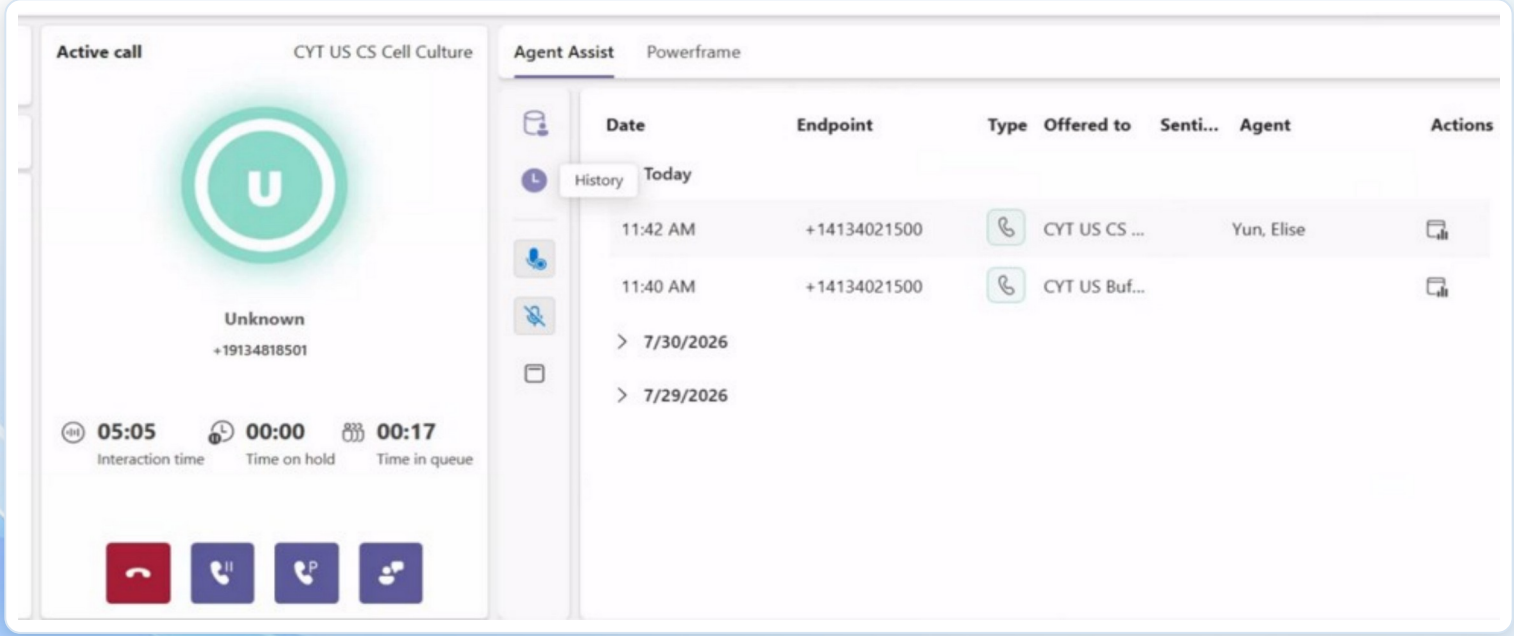
Sentiment & Classification

Calls are tagged and scored, so you know the tone before you connect.

AI-Powered Summaries

An automatic recap, issue, resolution, and narrative for every prior call.

The Agent Assist Panel



- Shows the caller's last 10 interactions
- Recording controls are built into the live call panel
- The Customer Timeline gives a recap, issue, resolution, and narrative for every call
- An admin sets what each Agent Assist profile can see

Active Call Card

CRM data (name, number, company), plus interaction, hold, and queue time.

History Tab

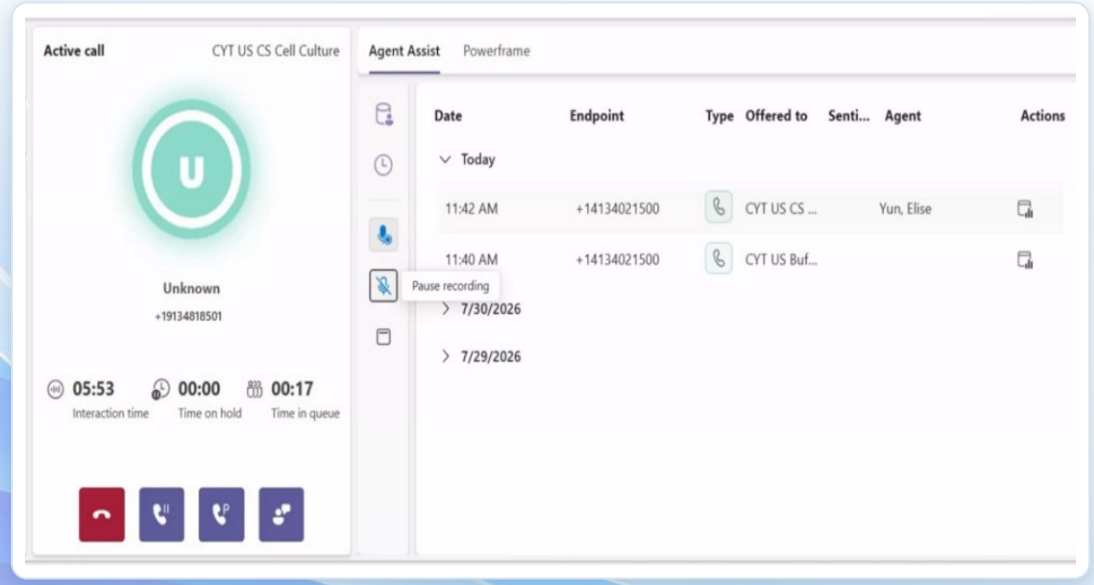
Select the clock icon to see every past interaction for this caller, by date.

Endpoint & Queue

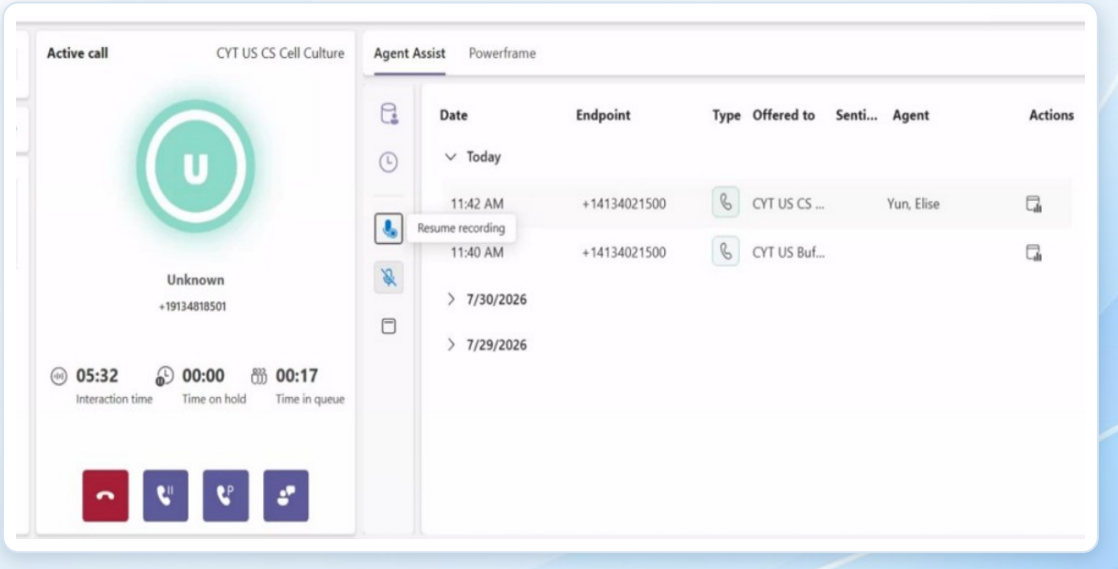
Each row shows the number, the queue it routed to, and the agent who handled it.

Pause and Resume Recording

Pause recording before sensitive details, such as payment information, and resume once that part of the call is done.

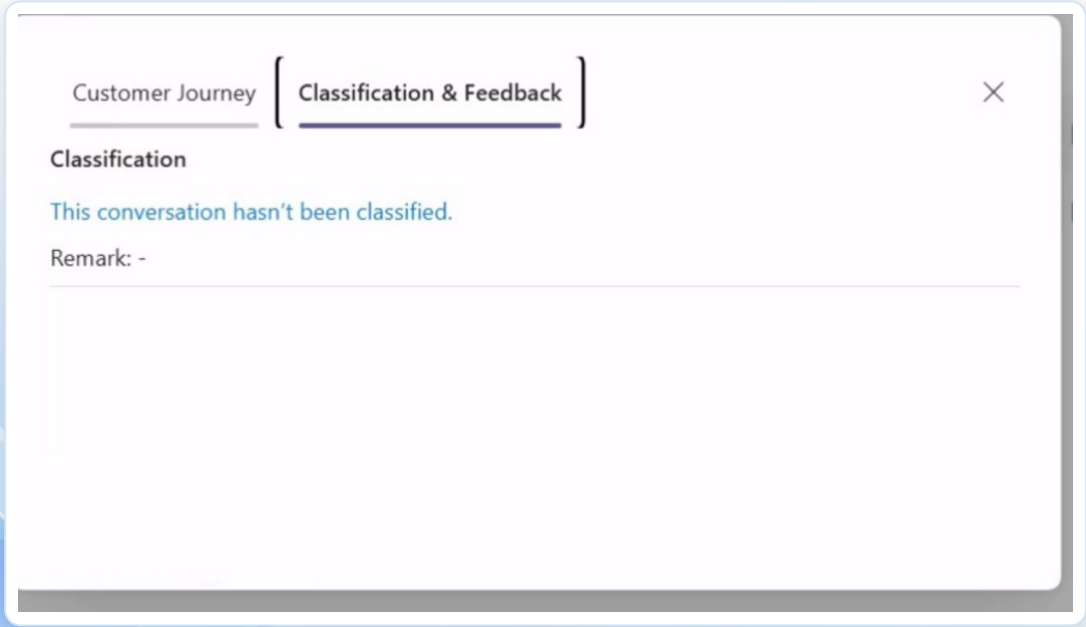


Pause: Select the microphone icon to stop recording.



Resume: Select it again to restart recording.

Classify Calls



- Tag each call with a classification code so every conversation is categorized.
- Shows why customers call, not just how many, to support root-cause analysis and staffing.
- Helps supervisors focus QA and coaching by issue type.

Set up in Admin Portal

Codes are configured by an admin in the CoreEngage admin portal, not by agents.

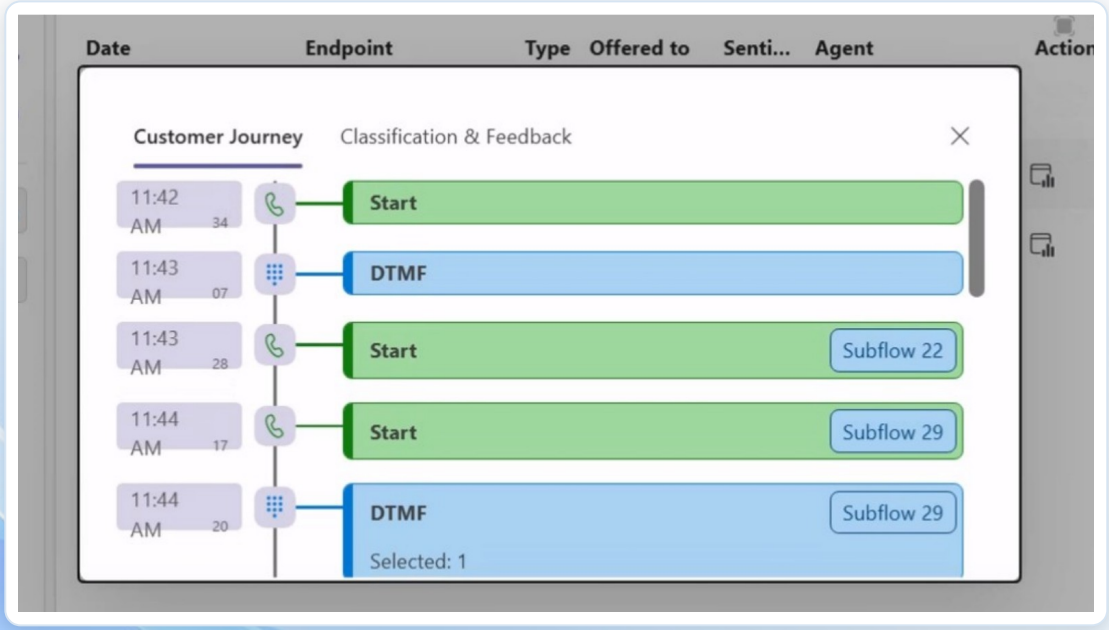
Used by Agents on Calls

Once configured, select a code to tag the call and add an optional remark.

Current Status: Cytiva

Codes aren't configured yet, so this tab shows "not classified" for every call.

See the Full Customer Journey



The Customer Timeline shows routing decisions, queues, transfers, agent hunts, classifications, and AI summaries.

Admins control this view per Agent Assist profile, so visibility matches each role.

Recap

A quick, plain-language summary of the call.

Issue

The core problem or reason for the call.

Resolution

What was done to resolve it, or its current status.

Narrative

A fuller, chronological account of the interaction.

Questions?

Thank you for attending CoreEngage Agent Training

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